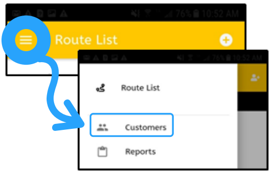
HOW TO ADD A CUSTOMER

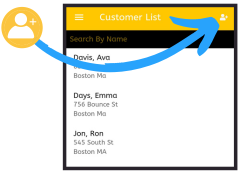
ADMIN ONLY FEATURE

Option 1 - Add Individual Customer From the Customers Menu

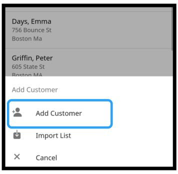
Click on the NAVIGATION BAR in the top left corner and select "Customers"



Click on the icon in the top right corner

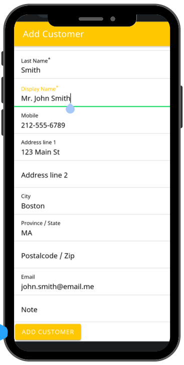


Select "Add Customer"



Enter the customer's information.

Display name is how you want the name displayed to the crew. For example, Mrs. Jones or Bob & Judy Green or just the address if you don't want .



Tap "ADD CUSTOMER" button to save.

New, "Active" customers can be added to a Route immediately.

Option 2 - Add Multiple Customers At Once

GOLD PLAN ONLY

Technically speaking, you can do this from your phone. We recommend using a computer from m.ezbz.app.

Create a new spreadsheet with your customer info.
We do not recommend reusing a spreadsheet.

You can download existing customer data from many commonly used services such as:

- *QuickBooks*
- *Google/Gmail Contacts*
- *Apple/iPhone Contacts*
- *Microsoft Outlook*

IMPORTANT!

There are a few things you must do before you upload your customer list:

- The top row must contain the header titles in the IMPORT CUSTOMER CSV SPREADSHEET, or the import will not work.
- The spreadsheet must be in .CSV format, or the import will not work.
- Garbage in, garbage out. The data you upload is what the app will use. We recommend reviewing your list carefully prior to upload to ensure that the data is accurate and correct.

A stitch, in time, saves nine. It's better to get it right the first time.

Seriously, they have to match exactly.

After you have:

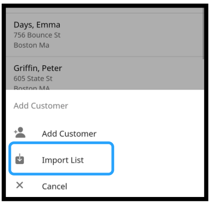
- ✅ Used the header rows from the IMPORT CUSTOMER CSV SPREADSHEET
- ✅ Double checked all of your data
- ✅ Saved the spreadsheet is .CSV format

You are ready to upload! Instructions are continued on the next page.

Option 2 - Add Multiple Customers At Once (cont)

Navigate to the Customers menu and tap the "Add Customer" icon in the top right corner.

Select "Import List"



Click the "Upload" button, select the .CSV file on your computer, and click "Open".

You can check the upload status in the "Import History" menu. If the status is "complete", you're good to go!

If your import fails:
First, refresh your browser, and then check the Customers menu. Some of the customers may have been imported even if you get a failure status.

Then, double check your spread sheet:

- Is it saved in .CSV format?
- Does every column with data have a header title row?
- Do the titles in the header column exactly match those in the IMPORT CUSTOMER CSV SPREADSHEET?
- Are the column header titles in the exact same order as those in the IMPORT CUSTOMER CSV SPREADSHEET?

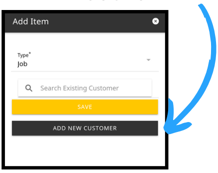
If the answer to any of the above question is "no", you will need to edit your spreadsheet so that the column header titles exactly match those on the IMPORT CUSTOMER CSV SPREADSHEET and save the file in .CSV format.

If the Import History shows a failure status with many more lines than what your sheet has, refresh the browser and check the Customer menu to see if any customer files successfully uploaded. If you should copy and paste only the data and headers onto a new spreadsheet.

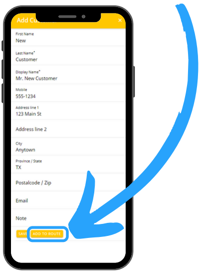
Option 3 - Add Individual Customer Directly Onto a Route

Tap the in the top right corner of the route name title bar.

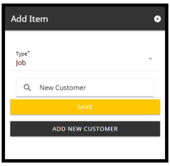
Select Job from the Type menu. Tap "ADD NEW CUSTOMER"



Fill in the customer information and click "Add to Route".



You will now see the customer's name in the search box. Tap "SAVE"



The customer is now on your route list!